

Application for Death Benefits Federal Employees Retirement System

This application is for use by persons applying for benefits which may be payable under the Federal Employees Retirement System (FERS) because of the death of an employee, former employee, or retiree who was covered by FERS at the time of his/her death or separation from Federal service. You should have received an informational pamphlet entitled, *Applying for Death Benefits Under the Federal Employees Retirement System*, SF 3114 with this application. If you did not receive the pamphlet and the deceased was a Federal employee at the time of his/her death, you should get a copy from the deceased's employing agency. If the deceased was retired or a former employee not yet receiving a retirement benefit, you should get a copy from the Office of Personnel Management (OPM). You can either write to the Office of Personnel Management at OPM, FERS, P.O. Box 45, Boyers, PA 16017-0045 or call OPM's Retirement Information Office at 1-888-767-6738. Customers within local calling distance to Washington, DC must contact OPM on 202-606-0500. You can also request SF 3114 over the Internet at www.opm.gov/retire/html/library/fers.html.

If the deceased was an employee at the time of death, send your completed application, with any requested attachments, to the personnel office in the agency where the deceased was last employee. If the deceased was a former employee or annuitant at the time of death, send it to the Office of Personnel Management, Federal Employees Retirement System, P.O. Box 45, Boyers, PA 16017-0045.

If your address changes before you receive your claim number, write to OPM, giving your name, date of birth, your Social Security Number, and the deceased person's name, date of birth and Social Security Number. If you have received your claim number, please refer to it

Instructions For Completing Application

Type or print clearly in ink. If you need more space in any section, use a plain piece of paper with your name, date of birth, and Social Security Number, and the deceased person's name, date of birth and Social Security Number, written at the top. If you do not know an answer, write "unknown." If you are unsure of information (for example, if you do not know an exact date), answer to the best of your ability, followed by a question mark (?).

The following additional information should help you to answer those questions on the application which are not entirely self-explanatory.

Section A - Information About the Deceased

- If deceased had ever applied for or received retirement benefits, show the CSA number (retirement claim number).
- 7. Recurring payments from the Office of Workers' Compensation Programs, U.S. Department of Labor (OWCP) and FERS survivor annuity benefits and/or the FERS Basic Employee Death Benefit usually are not payable for the same period of time. If the deceased had applied for or received benefits from the OWCP based on an illness or injury resulting from a condition of employment within the last two years, indicate here. The OWCP claim number appears on the U.S. Treasury checks and correspondence from OWCP.
- 8. See the pamphlet entitled, A pplying for D eath B enefits U nder the F ed eal E mployees R e tirement System, SF 3114 to help you determine which block to check.
- 10. If the deceased had no former marriage(s), write "none." Attach copies of death certificates, divorce

decrees from former marriage(s) or annulment(s). If you are the spouse of the deceased and were married to the deceased before, be sure to show the date your prior marriage(s) ended.

Section B - Information About the Applicant

5. If you checked "Designated beneficiary" and have a copy of the form designating you as beneficiary, attach it to the application. If you checked "Parent," both parents must submit completed applications. If one is deceased, attach a copy of the death certificate. Otherwise, provide name and address of other parent in Section F, if known. If you checked "executor or administrator of estate," attach a copy of the court order appointing you executor or administrator. (Note that a court must have appointed you; we will not pay you based on a will or other document prepared by the deceased.)

Section C - Information About the Deceased Person's Spouse

1. Attach a copy of your marriage certificate.

If you were married by a priest, rabbi, pastor, Justice of the Peace or other person empowered by the State to perform marriages, check "Clergy/Justice of the Peace". If you were **not** married by someone empowered by the State to perform marriages, check "Other" and explain (for example, "common law" or "tribal marriage").

If marriage is common law and a State court has determined that you were married, send a copy of the court order or judgment. If you do not have a court order or judgment, attach two notarized affidavits from persons who are in a position to know the facts which clearly show: (1) the relationship

between you, your spouse, and the person swearing to the affidavit; (2) the length of time you and the deceased lived together; (3) the address or addresses at which you resided while you lived together; (4) whether there was any public announcement in connection with your common law marriage; (5) whether you and the deceased were regarded among your neighbors, friends, and relatives as being husband and wife during the time you lived together; and (6) how the person swearing to the affidavit is in a position to know the facts being presented in the affidavit.

In addition, your own affidavit is required. It should show: (1) the date on which, and the State in which, you and your spouse mutually agreed to become husband and wife; (2) whether you or your spouse were ever married, ceremonially or under common law, to anyone else before entering into the common law relationship (if so, state in your affidavit all the facts of each previous marriage, including the date it took place and the date of the death or divorce which ended it); and (3) any other facts which you believe will help prove you were husband and wife. You may also submit other documents which show a husband and wife relationship such as a naturalization certificate, deeds, immigration records, insurance policies, passports, child's birth certificate, etc.

2. If you married the deceased more than once, give dates that each marriage began and ended.

Section E - Information About the Deceased Person's Dependent Children

- 1 a. List, in order of birth date, all the surviving, unmarried, dependent children of the deceased. List all such children you know of, no matter where they live. A dependent child is a son or daughter who is unmarried and:
 - was under age 18 at the time of the deceased person's death, including any:
 - 1. adopted child, and/or
 - 2. stepchild, and/or
 - recognized child born out of wedlock who lived with the deceased in a regular parentchild relationship, and/or
 - recognized child born out of wedlock if there was a judicial determination of support or if the deceased made regular and substantial contributions for the support of the child.
 - is age 18 or older, but who became mentally and/or physically disabled before age 18 and who, because of the disability, is incapable of selfsupport. Attach a copy of the Social Security Administration's determination of disability (prior to age 18) for disabled child(ren) over age 18.

- is between ages 18 and 22 and who is unmarried and a full-time student in school.
- b. Attach a copy of the birth certificate for each child for whom you are applying.
- d. Show how each child is related to the deceased. For example, write "Child of marriage at death" for a child of the deceased person's marriage in force at the time of death.
- e. If the unmarried dependent son or daughter is 18 or over, state whether he or she is a full-time student and/or disabled.
- 2. The mother of the unborn child, the legal guardian or the person responsible for the child should send us the birth certificate, when available.
- 3 d. If the person(s) in 3b. is (are) court appointed, indicate by checking the "Legal guardian" box. If you are the person who is court appointed, attach a copy of the court appointment to this application. If there is no court appointment, check "Other" and write in the relationship to the child, for example, mother, father, sister, etc.
- 4. You must apply for benefits from the Social Security Administration (SSA) for minor or disabled children of the deceased. Federal Employees Retirement System (FERS) benefits to children will not be paid until we have received verification of their entitlement to (and amount of) or lack of entitlement to SSA benefits. You should submit a copy of SSA's notice of award or denial with this application, if available. If it is not submitted, we will obtain the information from SSA, however, this may delay the processing of your claim.

Section F - Information About Other Heirs

Please give us information about other relatives who may be able to inherit from the deceased. If you can't give complete information, do the best you can. List only people who were living when the deceased died and who have the following relationships to the deceased:

- Widow(er) (unless named in Section C);
- Children of the deceased not included in Section E and the children of any deceased children (on a separate sheet of paper, show the relationships of descendants of deceased children to the deceased, for example, John and Mary, children of deceased son John, and Sue, child of deceased daughter Ann);
- If there is no living widow(er) or child, list the
 deceased person's parents (if only one parent survives, a copy of the deceased parent's death certificate should be attached, if available);
- If there are no living relatives of the deceased as described above and no court-appointed executor or administrator as described in Section G, list other relatives who can inherit from the deceased.

Section G - Information About the Deceased Person's Estate

 If someone was named as executor or administrator in the deceased person's will, but hasn't been appointed by the court, check "No." If you have been appointed by a court, attach a copy of the court appointment.

Section H - Active Military Service

You do not need to complete parts 1 and 2 of this section if the deceased was retired at the time of death, since the Office of Personnel Management (OPM) already has this information.

Indicate whether the deceased performed active duty that terminated under honorable conditions in the Armed Forces or other uniformed services of the United States. Inactive service in reserve components of the uniformed service is not creditable for retirement purposes. Service in the National Guard is not usually considered active Federal military service except when ordered to active duty in the service of the United States and during an initial (3 months or longer) training period. However, full-time National Guard duty is creditable, if the service interrupts creditable civilian service and is followed by reemployment (as explained in Chapter 43 of title 38) that occurs on or after August 1, 1990. If the deceased was a retiree, OPM already has information about his/her military service.

If you have a copy of the deceased person's DD 214's or other discharge certificate(s) showing the dates of active duty and the deceased was a former employee at the time of death, you should attach it (them) to your application.

 Persons who performed active military service after December 31, 1956, must pay or have paid a deposit to receive credit under the Federal Employees Retirement System (FERS) for the military service.

If the deceased was an employee at the time of death, you may pay or complete the payment of the deposit

by completing the election form contained in *Documentation and Elections in Support of Application for Death Benefits when Deceased was an Employee at the Time of Death,* Standard Form (SF) 3104B, which can be obtained from the agency where the deceased was last employed. The deceased's agency can provide you with more information regarding this deposit.

 Indicate whether the deceased ever received or applied for military retired pay.

If you are receiving military survivor benefits, the deceased person's military service is used for survivor purposes, subject to a reduction equal to the amount of your military survivor benefits. However, if such retired pay was awarded on account of a service-connected disability incurred in enemy combat or caused by an instrumentality of war in the line of duty during a war period, or was awarded under Chapter 67, Title 10, (formerly title III) of Public Law 80-810 (reserve retired pay at age 60 based on 20 years of active and reserve service), no such reduction is required. You should attach a copy of your award of military survivor benefits verifying the award was based on one of the above reasons.

Section K - Applicant's Checklist

Use this section of the application to ensure that all required supporting documentation is attached.

SF 3104A

If the deceased was a retiree at the time of death and you are the surviving spouse, you should complete *Survivor Supplement* (*FERS*), SF 3104A, which is attached to this application. Instructions for completing SF 3104A are contained on the form itself.

SF 3104B

If the deceased was an employee at the time of death and you are the surviving spouse or former spouse, you and the deceased person's agency should complete *Documentation and Elections in Support of Application for Death Benefits when Deceased was an Employee at the Time of Death, SF 3104B*, which can be obtained from the deceased person's former employing agency. Instructions for completing SF 3104B are contained on the form itself.

Solicitation of this information is authorized by the Federal Employees Retirement law (Chapter 84, title 5, U.S. Code). The information you furnish will be used to identify records properly associated with your application for Federal benefits, to obtain additional information if necessary, to determine and allow present or future benefits, and to maintain a uniquely identifiable claim file. The information may be shared and is subject to verification, via paper, electronic media, or through the use of computer matching programs, with national, state, local or other charitable or social security administrative agencies in order to determine benefits under their programs, to obtain information necessary for determination or continuation of benefits under this program, or to report income for tax purposes. It may also be shared and verified, as noted above, with law enforcement agencies when they are investigating a violation or potential violation of civil or criminal law. Public Law 104-134 (April 26, 1996) requires that any person doing business with the Federal government furnish a Social Security Number or tax identification number. This is an amendment to title 31, Section 7701. Failure to furnish the requested information may delay or prevent action on your application.



Application for Death Benefits

Form Approved OMB No. 3206-0172

Federal Employees Retirement System

Section A - Info	rmation About the Deceased				
1. Full name of deceased (last, first, middle)	2. Date of birth (mm/dd/yyyy)				
3. Date of death (mm/dd/yyyy) (Attach a certified copy of the	4. Social Security Number				
5. List any other names the deceased used (ex. maiden name	6. CSA number (if retired)				
7a. Was the deceased applying for or receiving workers' composition Programs (OWCP), Department	7b. OWCP claim number				
8. What was deceased person's employment status at the tim Benefits Under the Federal Employees Retirement Syste.		Applying for Death			
Employee — Complete SF 3104B, which can be obtain the deceased person's former employing	ned from Former Ret	iree → If you are the surviving spouse, complete SF 3104A (attached)			
9. Name of deceased person's spouse at time of death (if not	married at time of death write "none	2")			
10a. Name of deceased person's spouses from all former marriages	10b. How did each marriage end?	10c. Date each marriage ended (mm/dd/yyyy)			
	Death Divorce/annulment	t			
	Death Divorce/annulment				
Section B - Info	rmation About the Applicant				
1. Your full name (last, first, middle)	2. Date of birth (mm/dd/yyyy)	3. Social Security Number			
, , ,	2. Bate of office (minuted yyyy)	3. Boolar Boolarity I variable			
4. Are you a citizen of the United States of America? Yes No					
5. I am applying for benefits as <i>(check all boxes that apply)</i> : Widow(er) → complete Section C below	Executor or court order)	administrator of estate (attach copy of			
Designated beneficiary (attach copy of designation, if ava		ise Complete Section D on page 2			
Parent of decedent (Each parent should complete a separate application. If one parent is deceased, attach a copy of the death certificate.) Child (or as guardian of minor or disabled child) Other (specify):					
6. Did you cash any check(s) issued to the deceased or did yelloposit from the deceased's savings or checking account a	ou withdraw funds paid by direct of the date of death?	No Yes			
Section C - Information About the Deceased Person's Spouse					
	f you are the widow[er].)				
1. Marriage performed by	To to A	2. Date of marriage (mm/dd/yyyy)			
Clergy/Justice of the Peace Other (exp 3. Have you remarried after your spouse died?	lain)				
Yes No					
4a. Have you ever applied for a survivor annuity based on the deceased spouse other than the one named above in Sec	No → Go to item 5 below Yes → Complete items 4b-4e below				
4b. Name of deceased former spouse	4c. Date of birth (mm/dd/yyyy)				
4d. Name of retirement system (e.g. Civil Service, Foreign Service)	4e. Claim number (assigned to you by retirement system in item 4d.)				
5. If you will be receiving monthly payments, P.L. 104-134 if possible. See Section I.	requires that you be paid by direct do	eposit into a checking or savings account			

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Section D - Information About the Deceased Person's Former Spouse (Complete if you are a former spouse)						
1a. Date of marriage to the deceased (mm/dd/yyyy)	1b. Date of divorce from the deceased (mm/dd/yyyy)					
2. Is there a court order awarding you any portion of the deceased persor survivor benefits?	Son's Federal Employees Retirement System (FERS) retirement Yes, on record at OPM Yes, attached No					
3a. Are you paying for Federal Employees Health Benefits coverage to a former employing office?	$No \rightarrow Go \text{ to item } 4a$ $Yes \rightarrow Go \text{ to item } 3b$					
3b. Give name and address of agency where you send health benefit premiums:						
4a. Have you married again since your marriage to the deceased? No → Go to item 5a Yes → Go to item 4b 4b. Date of first marriage after marriage to deceased ended (mm/dd/yyyy)						
5a. Have you ever applied for a survivor annuity based on the Federal se spouse other than the one named on page 1, Section A1?	No \rightarrow Go to item 6 Yes \rightarrow 5b-5e below					
5b. Name of deceased former spouse (last, first, middle initial)	5c. Date of birth (mm/dd/yyyy)					
5d. Name of retirement system (ex. Civil Service, Foreign Service, etc.)	5e. Claim number assigned to you by retirement system in item 5d.					
 If you will be receiving monthly payments P.L. 104-134 requires that if possible. See Section I. 	at you be paid by direct deposit into a checking or savings account					
Special Note: If you checked "Employee" in Section A.8, and your former spouse performed more than 18 months of creditable civilian Federal service, and a court awards you all or a portion of the Basic Employee Death Benefit or a survivor annuity, contact the deceased person's former employing agency in order to complete the necessary election forms in Standard Form 3104B.						
Section E - Information About the Deco	eased Person's Dependent Children					
1a. Are there any unmarried dependent children as defined in the instruction Yes → Complete items						
1b. Name(s) of unmarried dependent 1c. Date of birth 1d. Child's	s relationship to deceased (child ner marriage, adopted, etc.) Student Disabled Security Number					
2. Is there a child of the deceased not yet born? Yes → When born, sen	nd birth certificate for child to OPM No					
Yes → When born, send birth certificate for child to OPM 3a. Do you (the applicant) have responsibility for all the children in Section E1? No → Complete items 3b-3d below Yes → Go to item 4a						
	3c. Name(s) of children 3d. Custodian's Relationship to child					
Programment Annual Programment A	Legal guardian Other → Specify					
	Legal guardian Other → Specify					
	Legal guardian Other → Specify					

NO	dministration (SSA) for minor or disabled children of the					
	deceased? No → (Application required for payment of benefits.) Yes					
4b. Have you attached a copy of the SSA's Notice of Award of determinations for each child?						
determinations for each child?	→ Not yet received (Forward to OPM upon receipt.)	Yes				
Section F - Information	mation About Other Heirs					
List other relatives who can inherit from the deceased as explain	ned in the instructions.					
1. Full name of relative 2. Comple		deceased				
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Section G - Information A	About the Deceased Person's Estate					
Has an executor, administrator or other official been	2. Full name and address of person appointed (street	city,				
appointed by the court to settle the estate of the deceased?	state, ZIP code)					
No → Go to item 3 below Yes -	→					
3. If an executor, administrator or other official has not been co	ourt appointed, will one be appointed?	No				
	ONLY if you are the surviving spouse or former	Name of the State				
	The state of the s					
Complete if deceased was an employee or former employee time of death, since OPM already has this information.	at time of death. Do not complete if the deceased was reti	red at the				
1. If the deceased performed active, honorable service in the A	armed Forces or other uniformed service as described in the i	nstructions,				
complete items 1a-b below and attach a copy of the discharge	ge certificate or other certificate of active military service (if	available).				
	b, Dates of active duty					
a. Branch of service						
	From (mm/dd/yyyy) To (mm/dd	√yyyy)				
	From (mm/dd/yyyy) To (mm/dd	∜yyyy)				
	From (mm/dd/yyyy) To (mm/dd	V_{yyyy}				
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	Section I - Direct I	Depos	it (Continued)				
2. Do you want to have payments by Direct D	your survivor annuity payments made to the beposit to the deceased before his or her deat	same on the same of the same o	checking or savings account to the an active account and you	ou must	be a owi	nade ner)?	No
3. Do you want your survivor annuity payments made to a checking or savings account to which we have not already been							INU
making payments by	Direct Deposit?				Yes	Г	No
4. Financial institution routing number (You may obtain this number by calling your bank, credit union, or savings institution. This number is very important. We cannot pay by direct deposit without it. We suggest you call your financial institution to verify this number.)							
5. Checking or savings a	account number	6. W	hat kind of account is this?				
					Checkin	g [Savings
7. Name and address of	your financial institution						
				,			
8. Telephone number of	your financial institution (including area co	ode)					
Special note: If you prefe	er, you may attach a cancelled personal check	k that s	hows the information request	ted abov	e, instea	ad of	filling in the
requested financial institu	ation information. If you attach your personation to confirm that the information on the ch	al check	k, it is especially important th	at you o	contact y	our b	ank, credit
	ion to confirm that the information on the ch use different routing numbers on checks.) O						
•	The state of the s						
	Section J - C	Certif	ication				
I hereby certify that all st	atements made in this application are true to	the be	st of my knowledge and that	no evid	ence rela	ating	to the
settlement of this claim is	s withheld. I have read and understand all of	the inf	ormation provided in the inst	tructions	s to this	applio	cation.
1. Signature of applicant	1. Signature of applicant named in Section B. (sign in ink; do not print.) 3. Daytime tele.# (area code) 4. Date (mm/dd/yyyy)						ı/dd/yyyy)
			Best time to call you				
			Best time to can you				
2. Mailing address			Warning: Any intentionall	y false o	or mislea	nding	statement or
			response you provide in this law punishable by a fine of	not mo	re than \$	10,00	00 or
			imprisonment of not more t 1001)	than 5 ye	ears or b	oth. (18 USC
and the same of th	Tananga Sanga Sangahan		<u> </u>				
	Section K - Appl						
•	wing documents to expedite the processing		application.	Attacl	hed		
Document Title	Requireme	nt	7		N/A	C	omments
Death certificate	Certified copy required in all cases						
Marriage certificate	Required if you were spouse of deceased a than once, provide copies of all certificates	nt time	of death (if married more				
Child(ren)'s birth certificate	Recommended for all children for whom you are applying for benefits						
Certificate	Needed for all minor children and spouse if spouse is under 60 and is						
currently eligible for mother, father or disability benefits from the Social Security Administration (SSA), based on deceased person's service. Also							
Social security award determinations	needed for all children who are unmarried and are age 18 or older, but who						
	became mentally and/or physically disable because of disability, are incapable of self- Office of Personnel Management (OPM) v	-suppor	t. If not submitted, the				
	SSA; however, this may delay the processing of your claim.						
Court papers appointing executor/administrator	Required if you are applying as executor or administrator of deceased person's estate						
Court papers appointing guardian for minor or disabled child(ren)							
	deceased and guardian has been appointed						
DD 214's or other military discharge	Provide if you are applying as surviving sp deceased was a former employee at time of	f death	Failure to attach the				
certificates	information may delay the processing of y	our cla	ım.				

FERS Federal Employees Bettrement System

Survivor Supplement

Federal Employees Retirement System

Complete this form if deceased was retired at the time of death. Attach this form to the *Application for Death Benefits*, SF 3104, before forwarding it to the Office of Personnel Management (OPM).

To be completed by surviving spouse if he/she is under age 60 and the deceased had at least 5 years of creditable civilian service.

Identifying Information						
Name of deceased retiree (last, first, middle initial)	Date of birth (mm/do	d/yyyy)	Socia	Security Number	CSA claim number	
A survivor's supplement is an additional benefit to the basic survivor annuity death benefit that is equal to the lesser of:						
1. The amount by which the survivor annuity that would have been payable under Civil Service Retirement System (CSRS) rules exceeds the basic annuity payable under Federal Employees Retirement System (FERS) rules, or						
2. The amount of a deemed widow/widower's Social Security benefit based on the deceased's service under FERS.						
The deceased retiree must have performed 5 years of service that could be creditable under FERS or CSRS rules, including one full calendar year of service creditable under FERS rules.						
You may be eligible for a survivor supplement if you are the	ne surviving spouse	of a retir	ee and	you are:		
1. under age 60; and						
2. entitled to Social Security benefits at age 60; and						
3. not presently eligible for Social Security mother, father	or disability benefit	s based o	n the c	leceased annuitant's	account.	
To help us determine your eligibility for a survivor supplement, you should provide the following information:						
1. Name of surviving spouse (last, first, middle initial)			2. Sp	oouse's date of birth	(mm/dd/yyyy)	
	3a. Are you eligible for Social Security disability benefits based on the deceased retiree's service?					
No → Go to item 4 Yes → Go to items 3a and 3b.	Yes No	Appl	ied, bu	t no response yet	Have not applied	
3b. Do you receive Social Security disability benefits based on your own service?						
	Yes No			t no response yet	Have not applied	
4. Are you eligible for Social Security mother or father benefits based on the deceased retiree's service?						
Yes No, I have been denied these benefits (attach photocopy of denial letter). No, I know I do not qualify for these benefits as there are no surviving dependent children under age 16 or disabled who are entitled to SSA child's insurance benefits.						
5. If you are not currently receiving Social Security mother, father or disability benefits, do you agree to notify us promptly if you are later awarded any of these benefits? Yes No						
6. Signature	7. Date (mm/dd/)	(עעעע		ephone number (inc	luding area code)	